

A close-up photograph of a hand holding a golden trophy. The trophy has a textured, cylindrical body and a pointed top. The background is a blurred blue, suggesting a person's face or a bright light source. The overall mood is one of achievement and success.

Manage sales, reach the goal

OptiBudget helps you manage your budgets
in Dynamics 365 CRM.

Optimate

Budget and goal management

- Reach your budget goals whatever you are working on sales or service.

Companies are no longer controlled based on managers gut feeling. You have budgets and goals for your business. But often larger goals are drowning in everyday work tasks.

OptiBudget gives you a better overview of your budgets and goals. You can see if your sales and service efforts are where they need to be in order to achieve the company's overall goals.

Your increased insight allows you to adjust your activities in time to reach the goals.

With OptiBudget you get:



Easier management and follow-up on budget and objectives

- > You get a flexible budget that can be displayed per salesperson, team, product, etc., so you know how the individual areas are doing.



Automatic budget accrual

- > If you enter your overall budget, the solution generates different goals, monthly, quarterly, etc., so you know what to achieve.



'Live overview' of your budget

- > You get a constant, periodic overview of your current sales and pipeline. Thereby you always know where to put your effort to reach the goals.



View your budgets from smartphone, tablet or PC

- > With OptiBudget you can monitor how your budget is going - even when you are not in the office.



Control who can see which budgets

- > Shall everyone have access to every budget as part of gamification. Must it be controlled who have access to what? With OptiBudget you decide!



An atypical consulting company

We are called digital troubleshooters - and most call on us when the others who are immediately similar to us are waving the white flag and have given up. Because they maybe look like us, but there is a world of difference. We are a team of competent specialists. Focus is always on your business, goals and terms in building your solution.

Optimate